

EXHIBIT AM

The SMART AUDIO Report



Methodology

1620 online surveys

800 Smart Speaker owners

820 Non-owners

Adults 18+

**Data weighted to Smart Speaker owner
estimates from Infinite Dial 2017**

15 in-home interviews with Smart Speaker owners

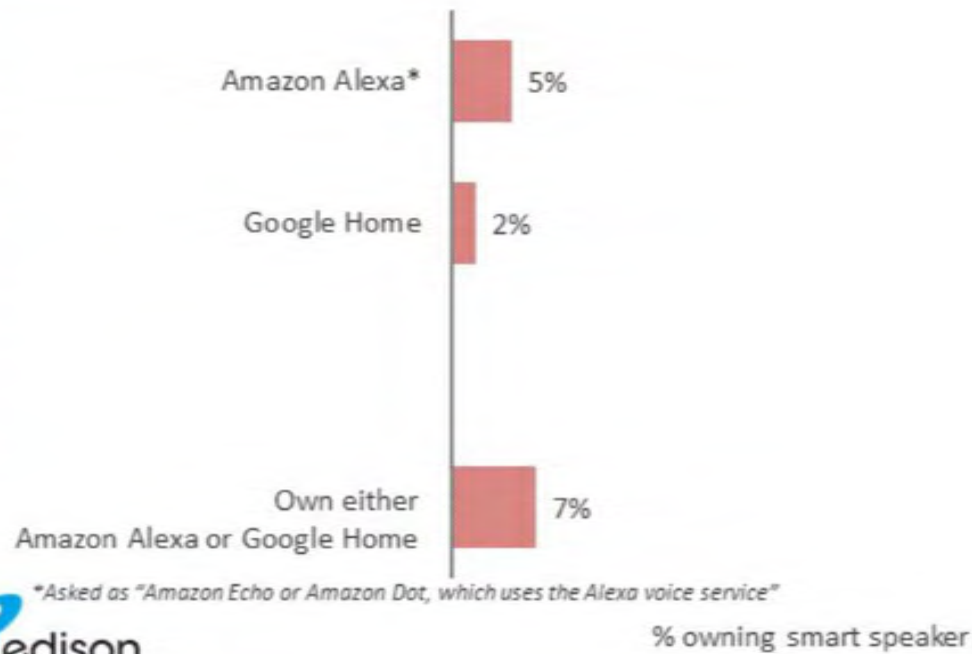
**Conducted in Atlanta, Chicago, Los Angeles,
New Jersey, and Allentown, PA**





Smart Speaker Ownership

Total Population 12+



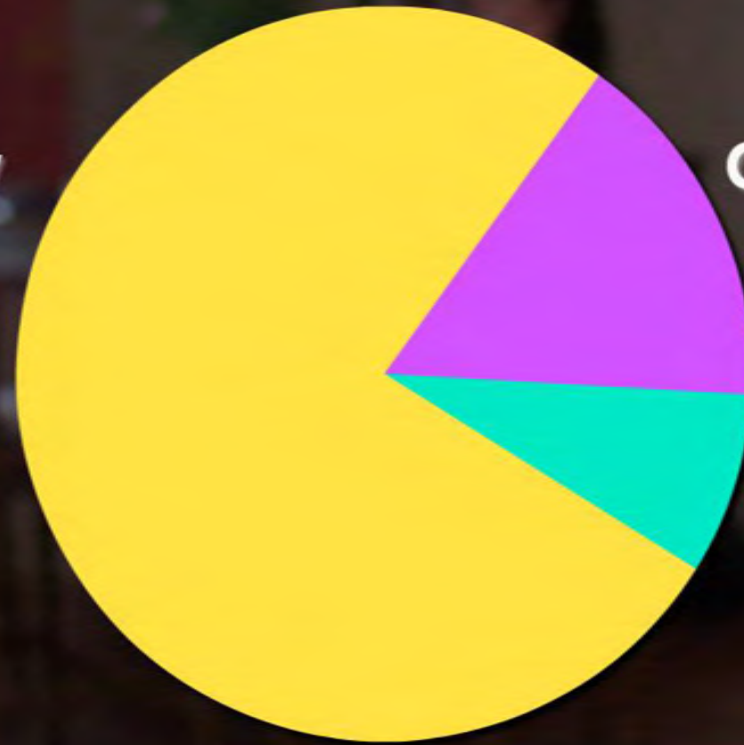
**Asked as "Amazon Echo or Amazon Dot, which uses the Alexa voice service"*



The Infinite Dial © 2017 Edison Research and Triton Digital

Smart Speaker Owners:

Alexa only
76%



Google Home only
16%

Both
8%

Subscribe to Amazon Prime:

Smart Speaker
Owners:

82%

Non-Owners:

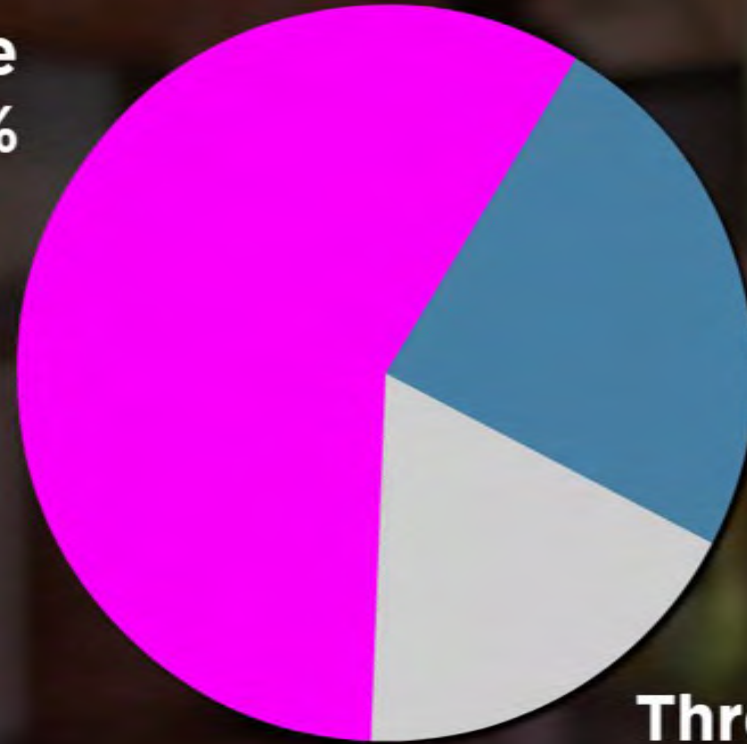
44%



How many Smart Speakers do you own?

Smart Speaker Owners

One
58%



Two
24%

Three or more
18%

45%

of Smart Speaker Owners

**plan to purchase
another
Smart Speaker**



Where is your primary Smart Speaker located?

Smart Speaker Owners

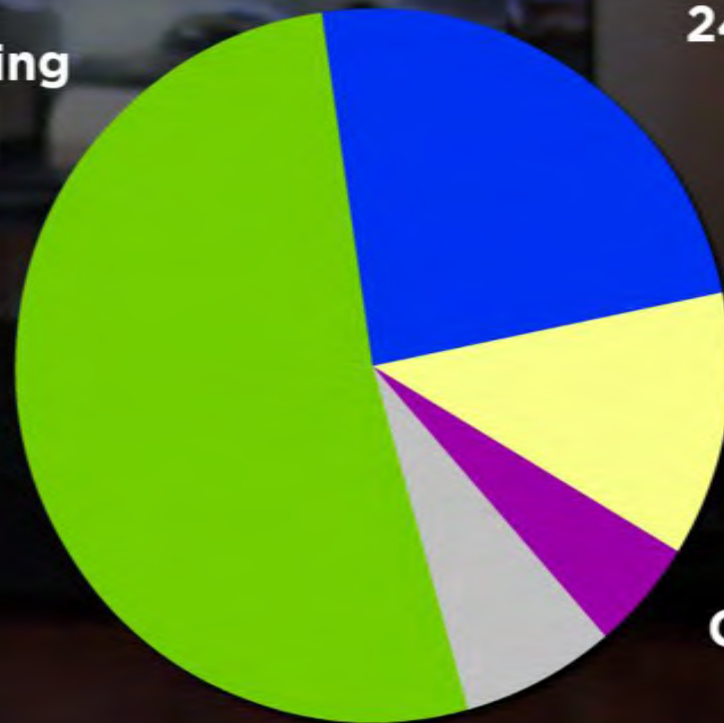
Living space
(family room/living
room/den)
52%

Kitchen
24%

Master bedroom
12%

Other bedroom
5%

Other location
7%



*If own more than one respondent was asked about the location of the speaker used most. If own one speaker respondent asked the location of speaker.

Smart Speaker Owners

**Compared to the first month of ownership,
are you now using your Smart Speaker...?**

**More often
47%**

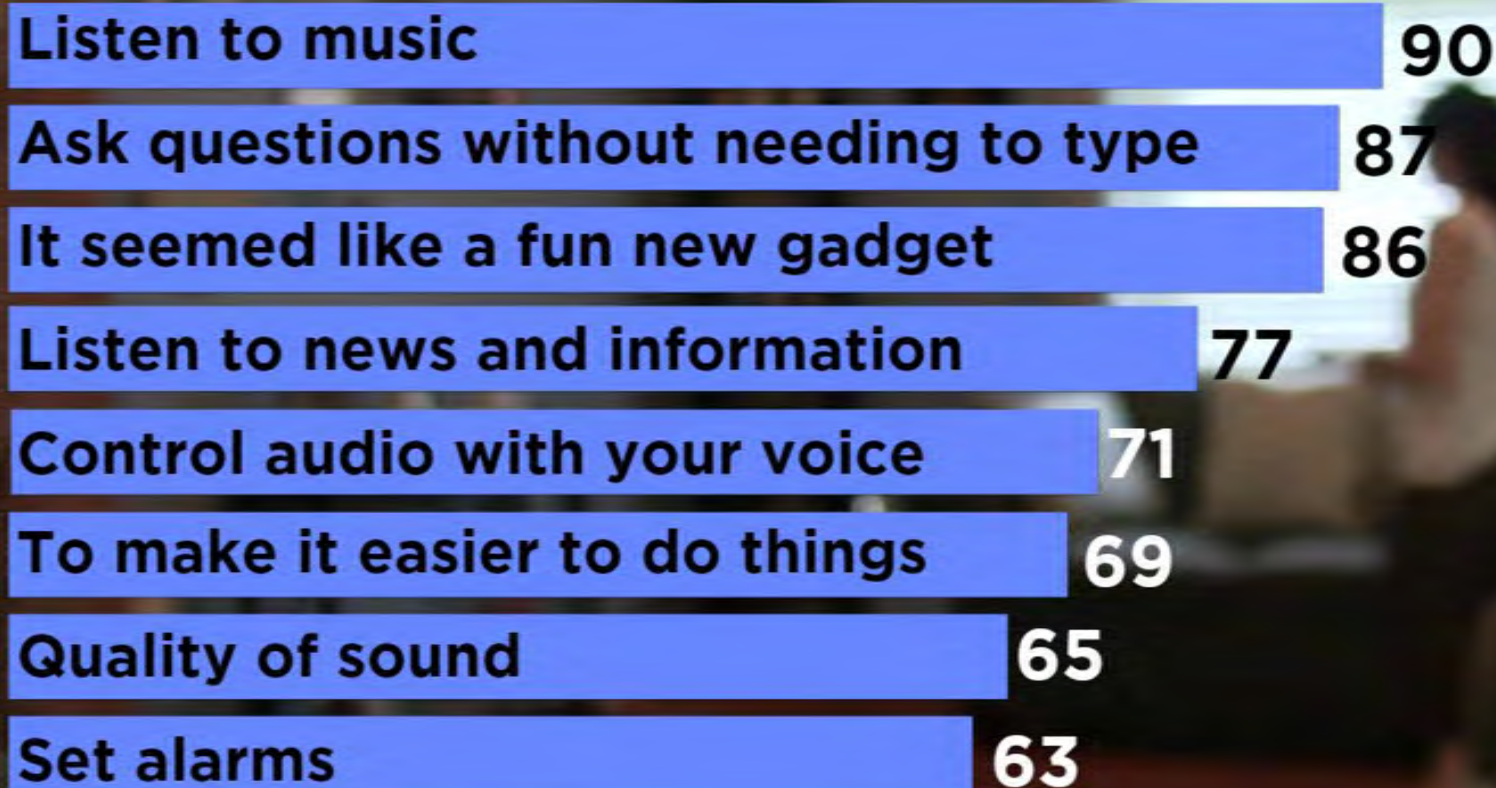
**About the
same
36%**

**Less often
17%**



Smart Speaker Owners

Reasons for wanting a Smart Speaker:



% saying reason

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Smart Speaker Owners

Reasons for wanting a Smart Speaker:

Hear better music than on AM/FM radio 62

Discover new songs 53

Control smart home devices 48

Listen to talk radio/sports talk 44

Listen to podcasts 40

Replace an old stereo 39

Entertain children 36

Help Disability 16

Help elderly 12

% saying reason





42%

of Smart Speaker Owners

**say that their Smart
Speakers are essential
to their everyday lives**



How much do you agree/disagree...

Smart Speaker Owners

Strongly Agree/Agree:

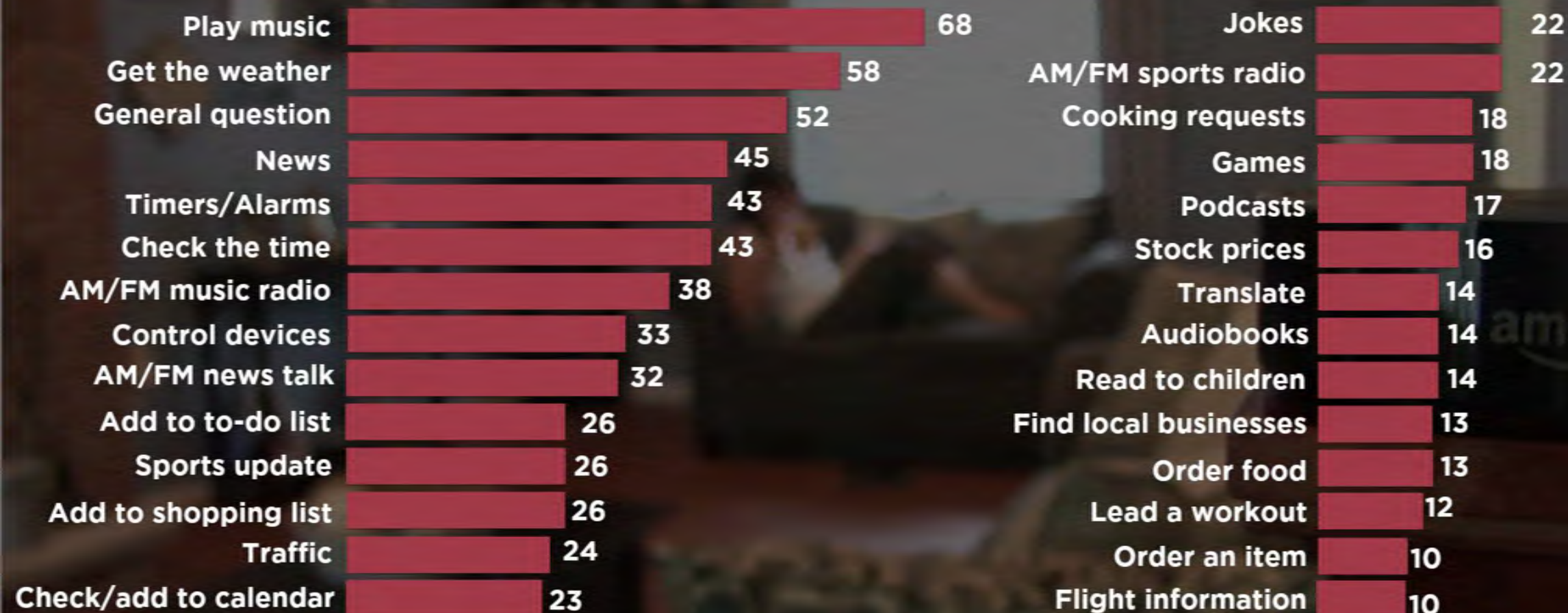
65%

"You wouldn't want to go back to life without your Smart Speaker"



Smart Speaker Owners

% Using Smart Speaker regularly for the following:



Smart Speaker Owners

% Using Smart Speaker regularly for the following:

Using an average of

7.5

of these 28 task types regularly



Listen to Podcasts:

Smart Speaker
Owners:

70%

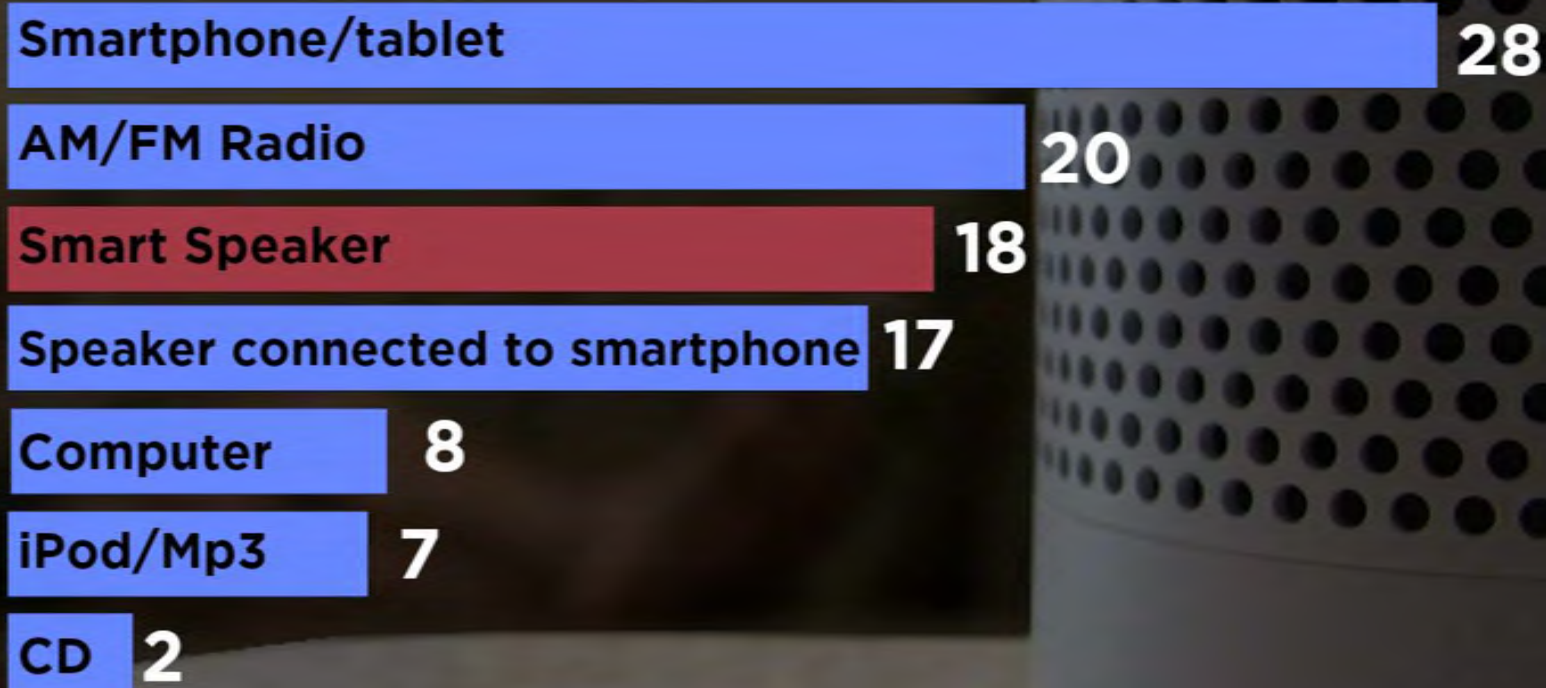
Non-Owners:

45%



How do you listen to audio most often?

Smart Speaker Owners



Listen to Internet Streaming sources:

Smart Speaker
Owners:

94%

Non-Owners:

71%



Have a paid subscription to an Internet Audio service:

Smart Speaker
Owners: **57%**

Non-Owners: **37%**



Smart Speaker Owners

Strongly Agree/Agree:

28%

How much do you agree/disagree...

"Getting your Smart Speaker led you to pay for a music service subscription"

How much do you agree/disagree...

Smart Speaker Owners

Strongly Agree/Agree:

70%

"You are listening
to more audio
since you got your
Smart Speaker"



Smart Speaker Owners

65%

listening to more

Music

since getting speaker

28%

listening to more

News/Talk

since getting speaker

20%

listening to more

Podcasts

since getting speaker

18%

listening to more

Audiobooks

since getting speaker



Those who listen to
Music
on a Smart Speaker

Median
4 hours **15** mins

of music listening
on a Smart Speaker
in the typical week

Those who listen to
News
on a Smart Speaker

Median
1 hour **15** mins

of news listening
on a Smart Speaker
in the typical week

Those who listen to
Podcasts
on a Smart Speaker

Median
1 hour **22** min

of podcast listening
on a Smart Speaker
in the typical week





29%

of Smart Speaker Owners

**use the "Flash/News
briefing" feature on
their Smart Speakers**

How much do you agree/disagree...

Smart Speaker Owners

Strongly Agree/Agree:

72%

"You don't know
enough about
your Smart
Speaker to use
all its features"



% using Smart home capabilities:

Smart Speaker Owners

Home lighting,
thermostat, appliances **35%**

Home security **34%**

Outdoor lighting/
equipment, sprinklers **20%**

Have children in household:

Smart Speaker
Owners:

45%

Non-Owners:

32%



Smart Speaker Owners With Children in Household

57%

said entertaining children was a
reason for wanting Smart Speaker



How much do you agree/disagree...

"The children in
your household
enjoy Alexa"



Smart Speaker Owners
with children in household

Strongly Agree/Agree:

88%



Smart Speaker Owners
with children in household

Strongly Agree/Agree:

80%



How much do you agree/disagree...

"[Alexa/Google Home] has made it easier to entertain the children in the household"



How much do you agree/disagree...

Smart Speaker Owners
Strongly Agree/Agree:

61%

"Having your Smart
Speaker is like
having someone
to talk to"



How much do you agree/disagree...

Smart Speaker Owners

Strongly Agree/Agree:

69%

"You have encouraged your friends to get a Smart Speaker"



Reasons why you do not currently own a Smart Speaker:

Base: Non-owners who have expressed interest in owning a smart speaker

Smart speakers are too expensive

60

You don't know enough about the speakers yet 48

You are worried you wouldn't use it enough

41

You worry that hackers could use it to access your home or personal info

41

It bothers you that smart speakers are always listening

36

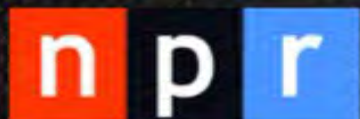
You are worried you would spend more money with one

35

You worry that it could allow the government to listen

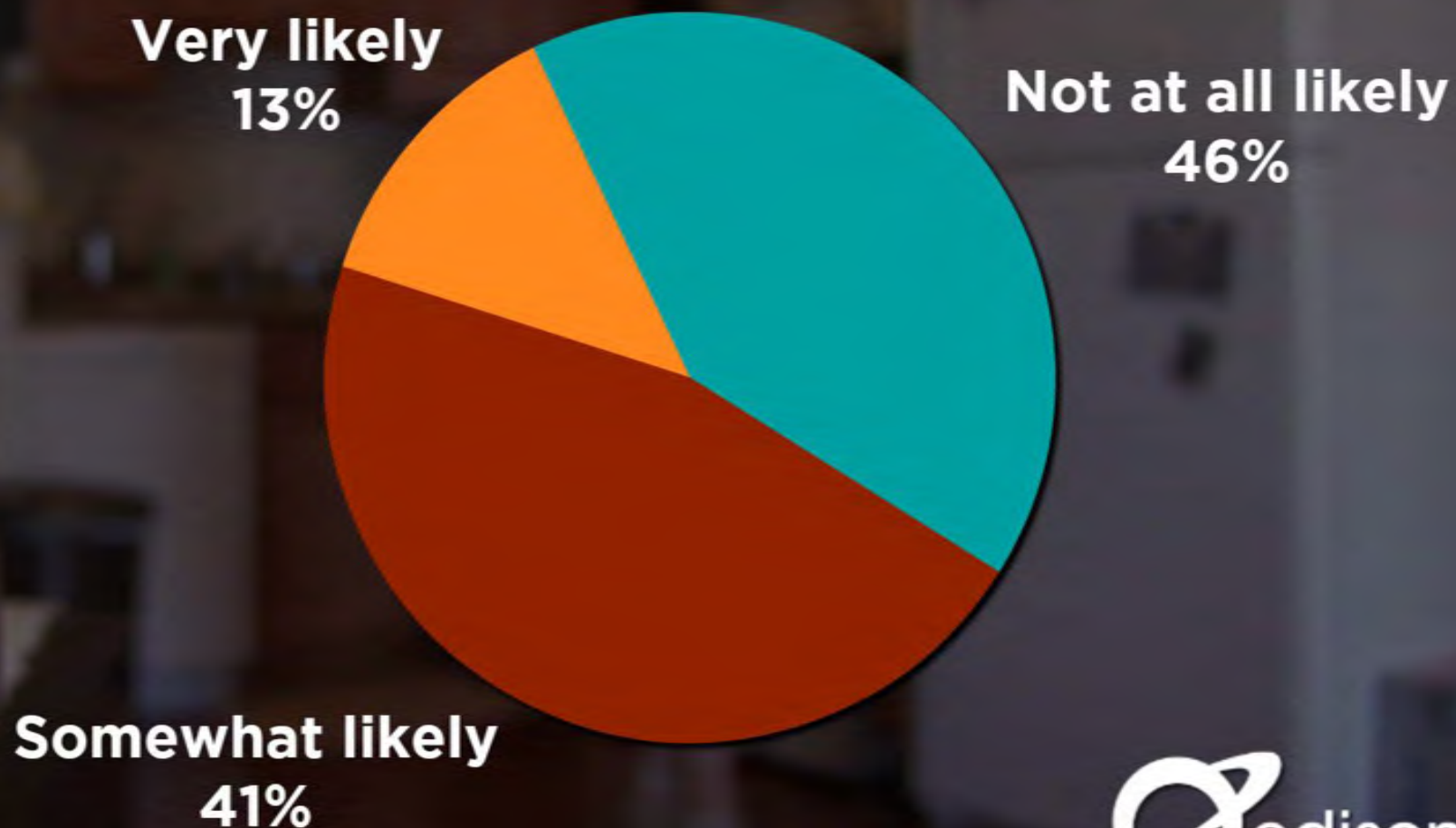
34

% saying reason



Non-Owners

How likely are you to purchase a Smart Speaker in the next six months?



Smart Speakers...

**...have quickly become
essential to many owners**

...encourage more audio listening

...make life easier, especially for parents

40%

of Smart Speaker Owners

**say that their Smart
Speakers have had an
impact on their lives**



www.nationalpublicmedia.com/smart-audio-report

The SMART AUDIO Report



